



A PROFILE OF GIVING IN THE PARISH

Town and parish

Deanery

Please state the number of committed donors who give in the following MONTHLY bands through your parish's various planned giving schemes (e.g. envelopes, bank standing orders, direct debit, gift aid charity vouchers), and their approximate total amounts given in the last or current calendar or tax year.

Monthly amount given	Approx equivalent per week	Number of donors	Total amount given £	
less than £20	under £5		£	To preserve individual confidentiality, please combine the results of adjacent rows if there are fewer than four donors in a band.
£20 to £40	£5 to £10		£	
£40 to £60	£10 to £15		£	
£60 to £80	£15 to £20		£	
£80 to £100	£20 to £25		£	
£100 to £150	£25 to £35		£	
£150 - £200	£35 - £50		£	
Over £200	Over £50		£	
Total each month	£	**	£	
Children's (< 16) giving scheme			£	

- a) What is your normal Sunday adult attendance?
- b) Some donors represent more than one adult individual (e.g. a couple).
How many individual adults does the donor total ** above represent?
- c) So roughly how many adults are not regular givers? (answers a & b)
- d) How many donors in the total above ** use Gift Aid or other tax-efficient giving schemes (payroll giving, charity vouchers etc.)?
- e) How many donors use bank standing orders or similar non-cash schemes?
- f) When did you last hold a renewal of giving pledges (month and year)?
- g) Name, address & telephone of the main person who deals with planned giving:



Guidance Notes for the Planned Giving Profile

The main purpose of this form is to help the incumbent and PCC identify the strengths and weaknesses in local committed giving, so please make copies to discuss with your PCC. You may want to include some of the findings in the church's annual report and accounts, or wider discussions at the APCM or AGM. Please try and ensure all committed givers are included.

Some churches whose main planned giving scheme coincides with the tax year may find it more convenient to complete this analysis for the tax year April – March.

Some people's income is irregular, and so their giving is irregular. Please estimate their typical giving over the year, and divide the result by 12 to find the appropriate monthly band to include them in.

Other people give more regularly, but use several different mechanisms (e.g. monthly banker's order for £30 plus a weekly envelope containing £1, £2, or an occasional CAF charity voucher). If possible, combine their various gifts to work out the appropriate band to assign them to.

Please record the NET amount given, before any Gift Aid (or covenant) tax reclaim. If some people make gross donations already including Gift Aid (e.g. through CAF charity vouchers) or payroll giving, please estimate their NET monthly contribution.

The PCC discussion might include issues such as:

- How does our church teach its members to respond to God's generosity?
- What is a fair way of sharing the financial costs amongst us?
- As most people's salary or pension is paid through their bank account, is it sensible to encourage more members to give regularly by bank standing order?
- Have most members who are taxpayers signed a Gift Aid declaration? Can we identify all their gifts to enable us to maximize the tax reclaim, or is some still given as (unidentified) cash on the plate, so no tax reclaim can be made?
- When a regular donor signs a suitable Gift Aid declaration, does the PCC claim the tax due as far back as 2000?
- Are Gift Aid envelopes available for casual visitors and one-off donations by church members?
- Is the PCC too dependent on the generosity of a few sacrificial donors?
- Do some dedicated church members pay church expenses out of their own pockets, and not seek reimbursement? If they are taxpayers, it is more effective to claim the expense, and then Gift Aid an equivalent donation. This also helps the church to determine a more realistic figure of its true costs.
- Low-key annual stewardship renewals are becoming the norm in many churches. How can we vary the content and approach from year to year, to ensure that different aspects of a Christian's discipleship and stewardship are covered over the years?
- Why do some people regularly support the work and worship of the church, but aren't prepared to make a regular financial commitment?
- Does the PCC use all its resources effectively? How often does it review the level of church hall rentals, wedding extras, or magazine advertising rates? Does it review the costs of its main suppliers (e.g. utilities, printing) every two or three years?
- How do our levels of giving compare to other churches in the deanery? Are we steadily moving towards paying 100% of our parish ministry costs (PMC)?
- Does the PCC set its members an example, and arrange to give away at least 10% of its voluntary income to other charities, as recommended by General Synod?